Ashford Business Services Ltd

Sales Follow-Up Plan

Following up a sales opportunity in planned steps instead of ad-hoc chasing: sequence, contact log, and close-out.

Document	Sales Follow-Up Plan
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Opportunity details

Field	Entry
Salesperson	Sarah Mitchell
Client company	Harborne Retail Group Ltd
Client contact	Client contact
Opportunity	Sarah Mitchell
Follow-up start date	9 November 2026
Target close date	9 November 2026
Value of opportunity	

Follow-up sequence

Step	Date	Method	Message / purpose
1	9 November 2026	Email	Thank the contact and confirm next steps for Sarah Mitchell
2		Phone call	Check questions on the proposal for Harborne Retail Group Ltd
3		Meeting	Agree the decision and the route to close by 9 November 2026

Follow-up steps in order

1. Send the opening follow-up on 9 November 2026, referencing Sarah Mitchell by name.
2. Phone Client contact at Harborne Retail Group Ltd if no reply arrives within three working days.
3. Book a closing meeting before 9 November 2026 and confirm the decision maker will attend.
4. Record the outcome of every contact in the log below the same day.

Contact log

Date	Method	Contact	Outcome	Next step

Close-out

Outcome: Follow-up outcome as agreed at the meeting.

Closed date: 9 November 2026

Reason won or lost: Reason won or lost as agreed at the meeting.

Handover to delivery: Handover decision as agreed at the meeting.

Lessons noted: Lessons noted as agreed at the meeting.

Completion checklist

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	The opportunity (Sarah Mitchell) and target close date (9 November 2026) are named.
	Every step of the sequence has a method and a purpose tied to Harborne Retail Group Ltd.
	The contact log is complete and the close-out records the won or lost reason.